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ABSTRACT

This trainer's guide is intended to assist supervisors of work-based career training projects in helping students understand the different types, purposes, and costs of filing systems available. The guide is one in a series of core curriculum modules that is intended for use in combination on- and off-the-job programs to familiarize youth with the skills, knowledge, and attitudes necessary for success in the workplace. Included in the guide are the following components: project information, a summary of the content and approach of the guide, supervisor's notes, off-the-job tutor's notes, background information, lists of tasks and core skills, an action plan that includes suggested learning activities, supervisor and trainee review sheets, and an assessment form. (MN)

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Youth Training Scheme CORE EXEMPLAR WORK BASED PROJECT

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Not another file!

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ESF
CORE SKILLS PROJECT
YTS

OTF No: 1

PROJECT No: M|7

TYPE Individual

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ASSESSMENT OF CORE SKILLS

This series of projects contains a number of different formats for recording assessment of core skills. These formats are offered for experimental purposes; none is proven as the 'best' method. All are based on the principle that feedback to trainees is a necessary part of the learning process and that such feedback should include information on core skill development.

Further work is being carried out on the methods of assessing achievement of core skills in work-based learning and of how to log such achievement on a record which trainees can take away from YTS. Some of the results of this work will be included in later MSC/ESF Core Skills Project publications.

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INTRODUCTION

WHAT ARE WORK-BASED PROJECTS?

Work-based projects are learning materials which aim to make the most of all the possibilities for developing trainees' skills, knowledge and attitudes in the workplace. They build upon everyday workplace tasks to provide experience of the whole range of YTS learning opportunities.

The projects in this series have been tested with managing agents as part of the YTS Core Project, which is jointly financed by MSC and the European Social Fund. In some cases managing agents will be able to use the projects as they are. In others they will need to be adapted to the circumstances of a particular workplace or to the aims of a particular scheme. Some managing agents will prefer to produce their own projects. For such cases these examples aim to demonstrate some principles of good design in work-based learning materials. These principles are:

To encourage trainees to learn by doing
To make the most of all the experiences which are available to trainees in the workplaces.
To start from a real task which is seen as relevant by all parties involved — trainees, workplace supervisors, trainers and off-the-job tutors.
To help trainees see the relationships between things learnt on- and off-the-job.
To base the assessment of achievement upon trainees' actual performance in tasks.
To look for all the opportunities for learning which arise from a task and, in particular, to help trainees to develop the core skills. These skills, in number, communication, problem-solving and practical activities, are used in a wide variety of tasks and are essential if trainees are to achieve competence in those tasks*. They are the skills — of finding out information, planning how to do things, overcoming difficulties and so on — which help trainees to learn more quickly in new situations, either in the same workplace, in a different one, or in the world outside work.

Such skills are required naturally by the workplace tasks in these projects and, in requiring trainees to go beyond the task itself, the projects deliberately *add* to the range of core skills which are required in an everyday working situation. This is especially important for some of the skills of communication and problem-solving which trainees are often not given the opportunity to exercise in work experience.

These principles can be incorporated in projects for all placements and for trainees of all ability levels. Although the projects in this series follow a common format, there is no single 'best' style. Nor is any special expertise in writing necessary. Good work-based projects can be produced by anyone who is determined to help trainees to exploit all of the potential for learning in work experience.

*A technical manual 'Core Skills in YTS' is currently available from MSC. It is supported by a short introductory leaflet and a practitioner's guide for supervisors. A separate manual is available on computer literacy/information technology.

PROJECT INFORMATION

Systematic filing is a key element in an efficient office and frequently one of the most tedious tasks. There are different systems of coding and storing and this project was originally written to enable the trainee to learn about these quickly and then use the information to solve a real problem in the workplace, becoming personally involved in the task rather than just routine "filing".

It was designed and tested in the planning section of the WEST MIDLANDS COUNTY COUNCIL and resulted in the successful organisation of a large volume of unfiled paperwork. It has since been used in other offices with similar degrees of success.

The trainee in WMCC gained in confidence by talking to colleagues and the project was an effective means of increasing the trainee's knowledge of filing systems and developing problem solving skills.

In the WMCC it was relatively easy for the trainee to see other filing systems in use but in a smaller office/company the comparison of systems may have to be done by using catalogues, or as an off-job activity.

The project should be seen as a training task for the young person not as an easy way of clearing the back-log of unsorted paperwork.

Although designed for use in an office in a large bureaucracy, and to establish a new filing system, the principles could easily apply and transfer to any organisation, large or small, that needs to file information or to update existing filing systems. For instance, the project has been used in a small shop to enable trainees to devise a filing system to provide information about the range of products stocked.

SUMMARY

The trainee is required to examine the extent and requirements of the paperwork to be filed, investigate the types of filing systems available, comparing cost and suitability in order to recommend the best system which has then to be implemented.

SUPERVISOR'S NOTES

INTRODUCTION

This work based project is designed to focus the trainee upon the CORE SKILL areas of: number; communication; practical skills, and problem-solving. Wherever possible, it is also designed to provide learning opportunities to improve personal effectiveness; to provide wider knowledge of the world of work and elsewhere; and to furnish the trainee with skills which can be transferred to other situations.

The essence of the work based project is that people learn more quickly and effectively by actually doing something.

The following notes are designed to help you, your staff, and the trainee, so that the project can be carried out with a minimum of disruption to normal work activity.

1. Where relevant, please advise other staff that the trainee will be doing the project;

2. Please ensure that the trainee has read the project details and understands what is required;

3. Please ensure that the trainee is aware of any aspects of safety, hygiene or security which might touch upon the project;

4. Please ensure that the trainee appreciates that good planning will make the task easier. Wherever possible, and before the project starts, the trainee should be encouraged to take responsibility for his/her learning by estimating time, deciding on equipment and materials, identifying possible hazards and other problems, and generally "thinking the project through".

5. Upon completion of the project discuss with the trainee the activities he/she has been engaged in. What problems were there? What has he/she learnt? Would he/she tackle the project differently?

Encourage the trainee to complete the trainee's review page.

For this particular project, you will find the following notes helpful :-

The trainee must see this as a real task that is going to help the office organisation as well as giving him/her the opportunity to improve his/her own knowledge and skill. It is therefore important not to overwhelm the trainee with too large a task nor to use the project simply as a means of getting up-to-date on a year's backlog of filing!

TASK 1

Select the section of paperwork carefully bearing in mind the purposes of the project.

Allow the trainee enough time to think through the requirements of this task before you discuss ideas with him/her.

TASK 2

It may be wise to inform colleagues in other sections that the trainee will be seeking information and to gain their co-operation.

TASK 3

Depending on your knowledge of the trainee and his/her written ability, you may find it necessary to check the letters before they are sent to suppliers.

TASK 5

Let the trainee decide which method(s) to choose.

After you have discussed with him/her the most suitable method of filing, you should also comment on his/her method of presentation.

ASSESSMENT NOTE Depending on the method chosen by the trainee it may be possible to give credit on the assessment form in one or more of -

Provide information by speaking to other people in the workplace. 7.1

Provide information in writing, and by means of tables and diagrams. 7.3

Provide information by demonstrating to other people. 7.4

TASKS 6 and 7

Once the system is installed, it should be given your seal of approval!

Names

TRAINEE .....

SUPERVISOR .....

TUTOR .....

Times

Please fill in the table below. This will show the time you spend on completing this project. The first column has been filled in as an example. Make another table if you need more space.

DATE				
START				
FINISH				
TIME SPENT (HOURS)				

BACKGROUND

Nobody really likes filing yet your experience in the office must have shown you how important it is to keep records efficiently. If you have worked in other departments you may have noticed that each has a slightly different way of coding and storing information.

SITUATION

Any office where a small filing system (or section of a larger one) needs to be set up or re-organised.

PURPOSES

This work-based project asks you to come up with a solution to a filing problem that has occured in your office.

Doing this project will enable you to learn more about filing systems. It will also help you to develop your CORE SKILLS (number, communication, problem-solving, and practical skills). Increasing your abilities in these skills will make it easier for you to change jobs and retrain when the need arises.

The tasks you are asked to do are outlined below, together with the most important CORE SKILLS that they contain. When you have finished each task, ask your supervisor to tell you how well she/he thought you did in the task, and record this on the Assessment Form near the back of this Project. This record will be needed to complete your Certificate at the end of your YTS year.

WBP TASK	ACTIVITY	CORE SKILLS
1.	Examine the nature of the filing problem and find out factors which affect filing systems.	Estimate quantity of observed items or materials. 3.1 Measure the dimensions of an object or structure. 4.1 Find out information by speaking to other people. 6.1
2.	Visit other sections and find out about the filing systems they use.	Find out information by speaking to other people. 6.1 Measure the dimensions of an object or structure. 4.1 Provide information in writing, and by means of tables and diagrams. 7.3
3.	Compare the costs of the different methods of filing.	Provide information in writing, and by means of tables and diagrams. 7.3 Compare the cost of different goods and services. 5.1

		Check the accuracy of written information. 11.5
		Plan how to find information. 9.7
4.	Decide which filing system best suits your needs.	Compare the relative costs and benefits of buying or using goods and services. 5.2
		Decide between alternative courses of action. 10.3
6.	Set up the new filing system.	Set up, assemble or dismantle equipment, machinery, instruments or products. 13.5
		Decide which category something belongs to. 10.2
7.	Make regular checks on the effectiveness of your new system.	Monitor a process or activity. 11.2

Each CORE SKILL is identified by number in the PRACTITIONER'S GUIDE to the YTS CORE, which contains advice and guidance on what CORE SKILLS are and their uses. The numbers are included here for ease of reference.

ACTION PLAN

Read through the Action Plan before starting work and make sure that you understand what you have to do. Discuss any problems with your supervisor.

TASK 1

Sift through the section of the paperwork that needs sorting out and note the type of information that needs filing.

Think carefully about the various factors that you need to consider before introducing the new system for filing this paperwork.

You will need to - 1/ estimate the amount of information that needs to be filed;

2/ measure the space available for the new files;

3/ find out the frequency with which the files are used.

There may be other things to consider as well, for example, security or fire risks, before you choose your system.

Record all this information in your note book and discuss it with your supervisor to make sure you haven't left anything important out.

TASK 2

Go round the different sections near your workplace and have a look at the different filing systems in use. Get permission first! Make notes on the various types of equipment used e.g. cabinets with drawers, cupboards with hanging pockets, ring binders, etc., and the systems within them e.g. alphabetical, date order, area order. Talk to the users of the different systems and make notes on the advantages and disadvantages of each.

For each system that seems suitable for your filing problem, take the necessary measurements to make sure the cabinets, cupboards, etc., being used would fit the space you have to fill. Record them in your note book.

Check if each department keeps a master catalogue of its files. Make a note of how that is organised and how it relates to the system.

TASK 3

Find out and compare the costs of the different filing systems you have investigated. To do this you will need to contact the suppliers of different filing systems. Plan how you are going to approach the different suppliers. Are you going to write, telephone, or call in person? You need to ensure that they send you information relevant to the particular systems you are looking at. Before you contact the suppliers check out your approach with your supervisor to ensure that the information you are giving is accurate.

When you receive the replies from the suppliers, compare the costs quoted for the different systems and record this in your notebook.

TASK 4

Look at all the information you have collected in your notebook and draw up a table to show the advantages and disadvantages of the different systems and their relative costs.

Decide which system best fits your needs.

Check very carefully to make sure that every file is included and that you haven't forgotten any of the important factors that you identified in task 2.

TASK 5

Plan the best way to inform your supervisor.

You could :-

i. just go and tell him/her;
ii. write a short report making your recommendation;
iii. set up a small section of the new system and explain by demonstration.

You must decide on the most effective method(s) and then present your information to your supervisor.

TASK 6

Once you have your supervisor's approval, you can go ahead and set up your system. Make sure, in doing this, that you pay due attention to the safety of yourself and your colleagues.

TASK 7

Periodically check that your new system is working effectively. Report your findings to your supervisor and if necessary, amend the system as a result of your monitoring.

TRAINEE REVIEW

PLEASE COMPLETE THIS FORM IN AS MUCH DETAIL AS POSSIBLE AND DISCUSS IT WITH YOUR SUPERVISOR AND TUTOR.

1/ Were you offered a selection of Projects to choose from? If so, why did you choose this one?

2. What did you think of it? Was it - easy, hard, interesting or boring?

3/ What did you learn? (Look at the list of Purposes).

4/ Did you learn something which was not on the list of Purposes?

5/ Did you need help with any particular part of the Project? What kind of help did you get?

6/ Were there any words in the Project that you did not understand? Please list them.

7/ Do you think you could use what you learned in another job, or outside work?

8/ Has this Project helped you decide whether you need further training in certain areas?

SUPERVISOR REVIEW

Please refer to Supervisor's Notes.

Please read the questions included under Trainee Review.

Please complete the Assessment Form and discuss your assessment with the trainee before initialling it to show that you both agree with the assessment.

COMMENTS:

ASSESSMENT

explanatory notes

In completing this wbp the trainee has the opportunity to demonstrate competence in the CORE SKILLS listed on the attached form.

The first two columns list the wbp Tasks and the CORE SKILLS which occur within them.

You are asked to assess the trainee's competence in these CORE SKILLS according to the amount of support from you that the trainee needed, for example:-

1) if a trainee is asked to "find information from written sources" and you provide the trainee with all the sources of that information, together with telling the trainee where to look in any particular source, then that trainee is obviously being given much more support in finding that information than a trainee who identifies the sources and extracts correct information unaided;

2) if a trainee is asked to undertake a task which involves "noticing the needs of customers or clients", and needs considerable prompting to approach a customer, then that trainee is obviously being given more support than a trainee who takes the initiative in approaching the customer.

To be regarded as fully competent in the CORE SKILLS, the trainee should need to be offered no more support than you would normally give to any experienced worker.

Most of the time job competence and CORE SKILLS competence are likely to be the same, but sometimes this may not be so. For instance, a trainee involved in machining a particular component may be competent so far as planning the work is concerned (a CORE SKILL), but may not have reached experienced worker speeds (an occupational skill).

Please tick the appropriate box and initial in the space provided, after you have discussed your assessment with the trainee and agreed any further training required.

ASSESSMENT FORM

PROJECT TITLE NOT ANOTHER FILE. WBP NO M/01/011 DATE

TRAINEE'S NAME SUPERVISOR'S NAME

WBP TASK NO	CORE SKILLS ASSESSED	NEEDED A LOT OF ASSISTANCE	NEEDED SOME ASSISTANCE	LITTLE OR NO ASSISTANCE		COMMENTS: INCLUDING NO OPPORTUNITY	AGREED INITIALS	
				NEEDS MORE PRACTICE	COMPETENT		TRAINEE	SUPERVISOR
1	3.1 Estimate quality of observed items or materials.							
1,2	4.1 Measure the dimensions of an object or structure.							
1,2	6.1 Find out information by speaking to other people.							
2,3	7.3 Provide information in writing, and by means of tables and diagrams.							
3	5.1 Compare the cost of different goods and services.							
3	11.5 Check the accuracy of written information.							
3	9.7 Plan how to find information.							
4	5.2 Compare the relative costs and benefits of buying or using goods and services.							

ASSESSMENT FORM continued.

WBP TASK NO	CORE SKILLS ASSESSED	NEEDED A LOT OF ASSISTANCE	NEEDED SOME ASSISTANCE	LITTLE OR NO ASSISTANCE		COMMENTS: INCLUDING NO OPPORTUNITY	AGREED INITIALS	
				NEEDS MORE PRACTICE	COMPETENT		TRAINEE	SUPERVISOR
4	10.3 Decide between alternative courses of action.							
6	13.5 Set up, assemble or dismantle equipment, machinery, instruments or products.							
6	10.2 Decide which category something belongs to.							
7	11.2 Monitor a process or activity.							